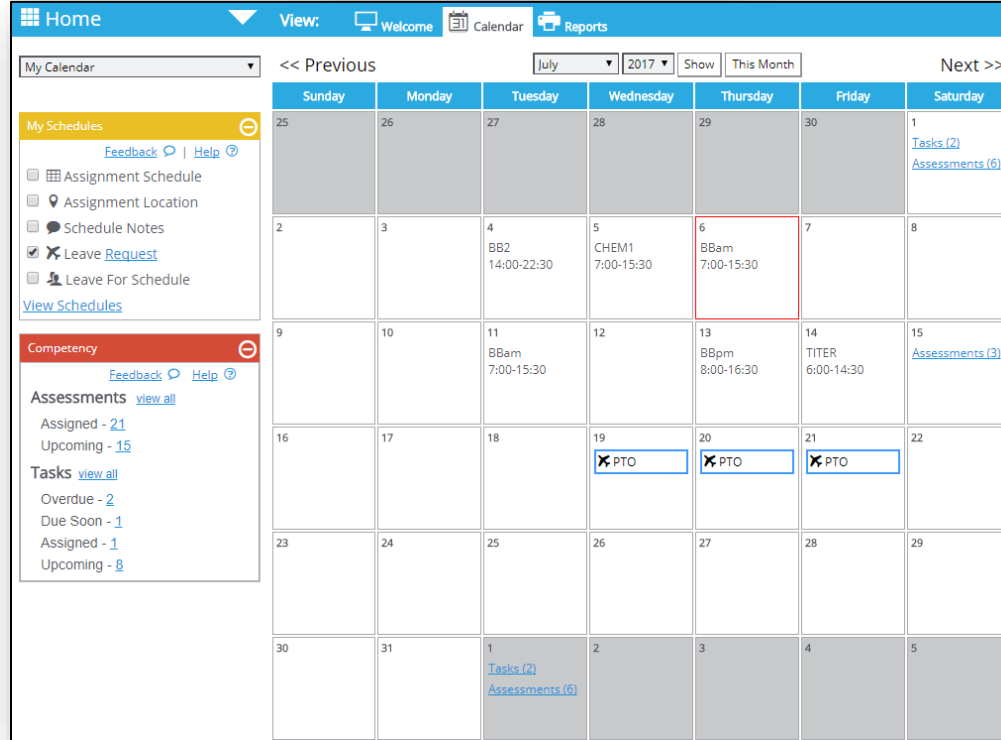


## Calendar View Competency

This reference guide provides a process overview of the **Competency** submenu within the **Calendar** view in the StaffReady Welcome module. The following process steps and instructional information are provided within this document:

- **Assessment Status**
- **Task Status**
- **Viewing Assessments and Tasks on Calendar**
- **Show assessment due date and qualified personnel**



The screenshot displays the StaffReady interface for the 'Calendar View Competency' section. The top navigation bar includes 'Home', 'View: Welcome', 'Calendar', and 'Reports'. The main content area shows a calendar for July 2017, with navigation controls for 'Previous' and 'Next' months. The left sidebar contains two main sections: 'My Schedules' and 'Competency'. The 'Competency' section is expanded, showing 'Assessments' (Assigned: 21, Upcoming: 15) and 'Tasks' (Overdue: 2, Due Soon: 1, Assigned: 1, Upcoming: 8). The calendar grid shows various events, including 'BB2', 'CHEM1', 'BBam', 'BBpm', and 'TITER', along with 'PTO' days. A red box highlights the event 'BBam' on Thursday, July 6th.

| Sunday | Monday | Tuesday   | Wednesday                | Thursday                 | Friday                    | Saturday  |
|--------|--------|---|--------------------------|--------------------------|---------------------------|---|
| 25     | 26     | 27  | 28                       | 29                       | 30                        | 1<br><a href="#">Tasks (2)</a><br><a href="#">Assessments (6)</a> |
| 2      | 3      | 4<br>BB2<br>14:00-22:30   | 5<br>CHEM1<br>7:00-15:30 | 6<br>BBam<br>7:00-15:30  | 7                         | 8   |
| 9      | 10     | 11<br>BBam<br>7:00-15:30  | 12                       | 13<br>BBpm<br>8:00-16:30 | 14<br>TITER<br>6:00-14:30 | 15<br><a href="#">Assessments (3)</a>                             |
| 16     | 17     | 18  | 19<br>PTO                | 20<br>PTO                | 21<br>PTO                 | 22  |
| 23     | 24     | 25  | 26                       | 27                       | 28                        | 29  |
| 30     | 31     | 1<br><a href="#">Tasks (2)</a><br><a href="#">Assessments (6)</a> | 2                        | 3                        | 4                         | 5   |

## 1 | Assessment Status

In the **Competency** submenu of the **Calendar** view, the **Assessments** section will show you assessments that are in the following status: **Assigned** and **Upcoming**. **Assigned** contains assessments that are Not Started and Started that are available to be completed. **Upcoming** contains assessments that will be assigned in the future. If an assessment is completed, it won't show up.

### Assessment Status

1. Navigate to the **Calendar** view.
2. Click **Previous** to view the previous month.
3. Click **Next** to view the next month.
4. Click **View All** to view all assessments
5. Click the Number next to **Assigned** to view any assigned assessments.
6. Click the Number next to **Upcoming** to view any upcoming assessments.

The screenshot displays the StaffReady calendar interface. The top navigation bar includes 'Home', 'View: Welcome', 'Calendar', and 'Reports'. The main area shows a calendar for July 2017. The left sidebar contains a 'Competency' submenu with the following sections:

- My Schedules** (Feedback | Help)
  - Assignment Schedule
  - Assignment Location
  - Schedule Notes
  - Leave Request
  - Leave For Schedule
  - [View Schedules](#)
- Assessments** (Feedback | Help)
  - [view all](#)
  - Assigned - [21](#)
  - Upcoming - [15](#)
- Tasks** (view all)
  - Overdue - [2](#)
  - Due Soon - [1](#)
  - Assigned - [1](#)
  - Upcoming - [8](#)

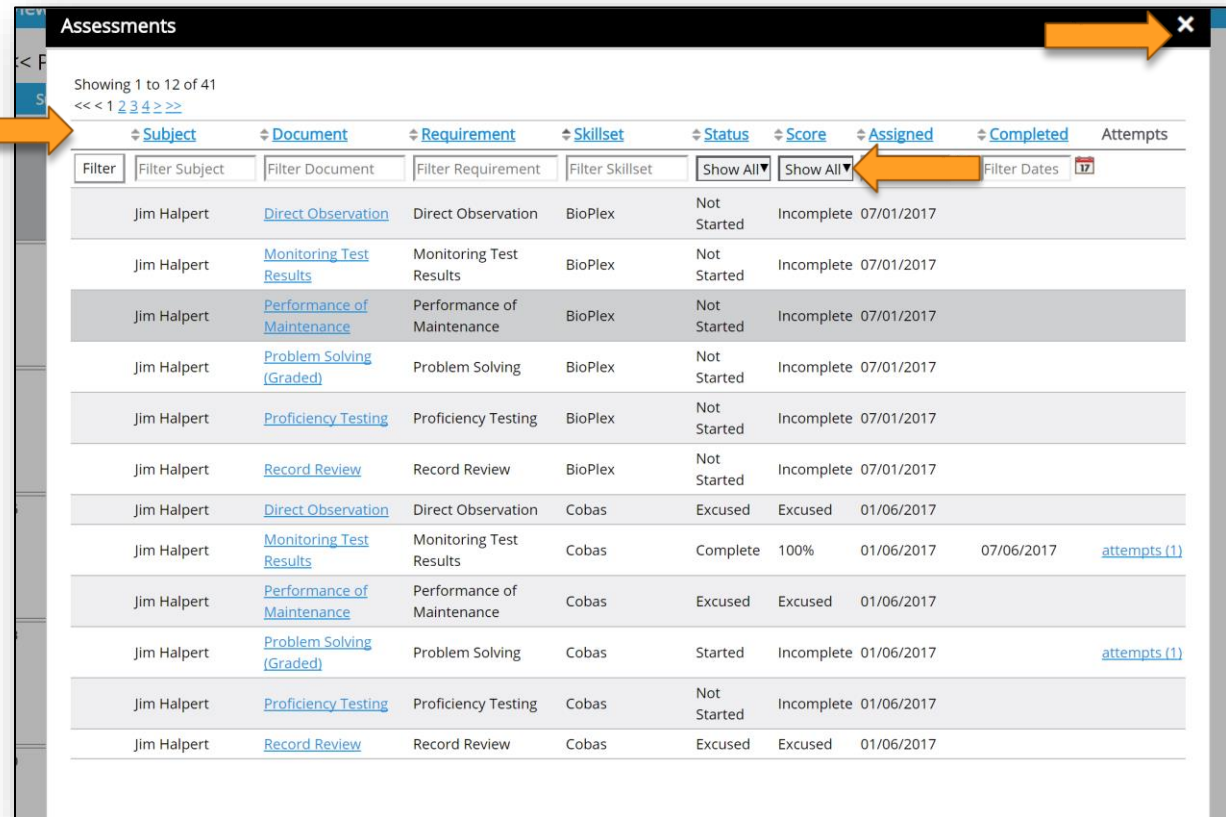
The calendar grid shows the following data for July 2017:

| Sunday | Monday | Tuesday   | Wednesday                | Thursday                 | Friday                    | Saturday  |
|--------|--------|---|--------------------------|--------------------------|---------------------------|---|
| 25     | 26     | 27  | 28                       | 29                       | 30                        | 1<br><a href="#">Tasks (2)</a><br><a href="#">Assessments (6)</a> |
| 2      | 3      | 4<br>BB2<br>14:00-22:30   | 5<br>CHEM1<br>7:00-15:30 | 6<br>BBam<br>7:00-15:30  | 7                         | 8   |
| 9      | 10     | 11<br>BBam<br>7:00-15:30  | 12                       | 13<br>BBpm<br>8:00-16:30 | 14<br>TITER<br>6:00-14:30 | 15<br><a href="#">Assessments (3)</a>                             |
| 16     | 17     | 18  | 19<br>PTO                | 20<br>PTO                | 21<br>PTO                 | 22  |
| 23     | 24     | 25  | 26                       | 27                       | 28                        | 29  |
| 30     | 31     | 1<br><a href="#">Tasks (2)</a><br><a href="#">Assessments (6)</a> | 2                        | 3                        | 4                         | 5   |

7. Depending on which option you choose, the correct screen will pop-up already pre-filtered.

6. Use the **Sorting** and **Filtering** options at the top to get to the information you are looking for.

7. Once completed, click the 'X' to close the window



The screenshot shows a window titled "Assessments" with a close button (X) in the top right corner. Below the title bar, it says "Showing 1 to 12 of 41" and has pagination controls. A table lists various assessments with columns for Subject, Document, Requirement, Skillset, Status, Score, Assigned, Completed, and Attempts. Orange arrows point to the close button, the filter options, and the "Show All" dropdown menu.

| Filter      | Filter Subject                             | Filter Document            | Filter Requirement | Filter Skillset | Show All   | Show All   | Filter Dates | Attempts                     |
|-------------|--|----------------------------|--------------------|-----------------|------------|------------|--------------|------------------------------|
| Jim Halpert | <a href="#">Direct Observation</a>         | Direct Observation         | BioPlex            | Not Started     | Incomplete | 07/01/2017 |              |                              |
| Jim Halpert | <a href="#">Monitoring Test Results</a>    | Monitoring Test Results    | BioPlex            | Not Started     | Incomplete | 07/01/2017 |              |                              |
| Jim Halpert | <a href="#">Performance of Maintenance</a> | Performance of Maintenance | BioPlex            | Not Started     | Incomplete | 07/01/2017 |              |                              |
| Jim Halpert | <a href="#">Problem Solving (Graded)</a>   | Problem Solving            | BioPlex            | Not Started     | Incomplete | 07/01/2017 |              |                              |
| Jim Halpert | <a href="#">Proficiency Testing</a>        | Proficiency Testing        | BioPlex            | Not Started     | Incomplete | 07/01/2017 |              |                              |
| Jim Halpert | <a href="#">Record Review</a>              | Record Review              | BioPlex            | Not Started     | Incomplete | 07/01/2017 |              |                              |
| Jim Halpert | <a href="#">Direct Observation</a>         | Direct Observation         | Cobas              | Excused         | Excused    | 01/06/2017 |              |                              |
| Jim Halpert | <a href="#">Monitoring Test Results</a>    | Monitoring Test Results    | Cobas              | Complete        | 100%       | 01/06/2017 | 07/06/2017   | <a href="#">attempts (1)</a> |
| Jim Halpert | <a href="#">Performance of Maintenance</a> | Performance of Maintenance | Cobas              | Excused         | Excused    | 01/06/2017 |              |                              |
| Jim Halpert | <a href="#">Problem Solving (Graded)</a>   | Problem Solving            | Cobas              | Started         | Incomplete | 01/06/2017 |              | <a href="#">attempts (1)</a> |
| Jim Halpert | <a href="#">Proficiency Testing</a>        | Proficiency Testing        | Cobas              | Not Started     | Incomplete | 01/06/2017 |              |                              |
| Jim Halpert | <a href="#">Record Review</a>              | Record Review              | Cobas              | Excused         | Excused    | 01/06/2017 |              |                              |

## 2 | Task Status

In the **Competency** submenu of the **Calendar** view, the **Tasks** section will show you tasks that are in the following status: **Overdue**, **Due Soon**, **Assigned**, and **Upcoming**. Only incomplete tasks will show in this area. Even though you can see future tasks, only tasks that are ready to be completed will be available to be started.

### Task Status

1. Navigate to the **Calendar** view.
2. Click **Previous** to view the previous month.
3. Click **Next** to view the next month.
4. Click **View All** to view all tasks
5. Click the Number next to **Overdue** to view any overdue tasks
6. Click the number next to **Due Soon** to see any tasks that are due soon
7. Click the number next to **Assigned** to see any tasks that are assigned.
8. Click the Number next to **Upcoming** to view any upcoming tasks

The screenshot displays the StaffReady interface. At the top, there's a navigation bar with 'Home', 'View: Welcome', 'Calendar', and 'Reports'. Below this, a dropdown menu shows 'My Calendar'. Navigation controls include '<< Previous' (with an orange arrow pointing left), a date selector for 'July 2017', and 'Show This Month' and 'Next >>' (with an orange arrow pointing right).

The main content area is divided into two sections:

- My Schedules:** Contains options for 'Assignment Schedule', 'Assignment Location', 'Schedule Notes', 'Leave Request' (checked), and 'Leave For Schedule'. A 'View Schedules' link is at the bottom.
- Competency:** Contains sections for 'Assessments' (view all) and 'Tasks' (view all). Under 'Assessments', there are counts: 'Assigned - 21', 'Upcoming - 15'. Under 'Tasks', there are counts: 'Overdue - 2', 'Due Soon - 1', 'Assigned - 1', 'Upcoming - 8'. An orange arrow points to the 'Tasks view all' link.

The calendar grid below shows a weekly view from Sunday to Saturday. The grid contains various tasks and assessments, such as 'BB2 14:00-22:30', 'CHEM1 7:00-15:30', 'BBam 7:00-15:30', 'BBpm 8:00-16:30', and 'TITER 6:00-14:30'. A red box highlights a task on Thursday, July 6th. The grid also shows 'PTO' (Paid Time Off) for several days (19, 20, 21) and links for 'Tasks (2)' and 'Assessments (6)' for specific days.

7. Depending on which option you choose, the correct screen will pop-up already pre-filtered.

6. Use the **Sorting** and **Filtering** options at the top to get to the task you are looking for.

8. You can click the [Start Task](#) link next to tasks that are available for you to complete.

7. Once completed, click the 'X' to close the window

**NOTE:** Upcoming tasks can show up if using the show all filter or the upcoming filter. These tasks could be for the second part of proficiency testing, graded exam, or they could just be a future task.

Tasks

Showing 1 to 10 of 11  
 <<< 1 2 >>>

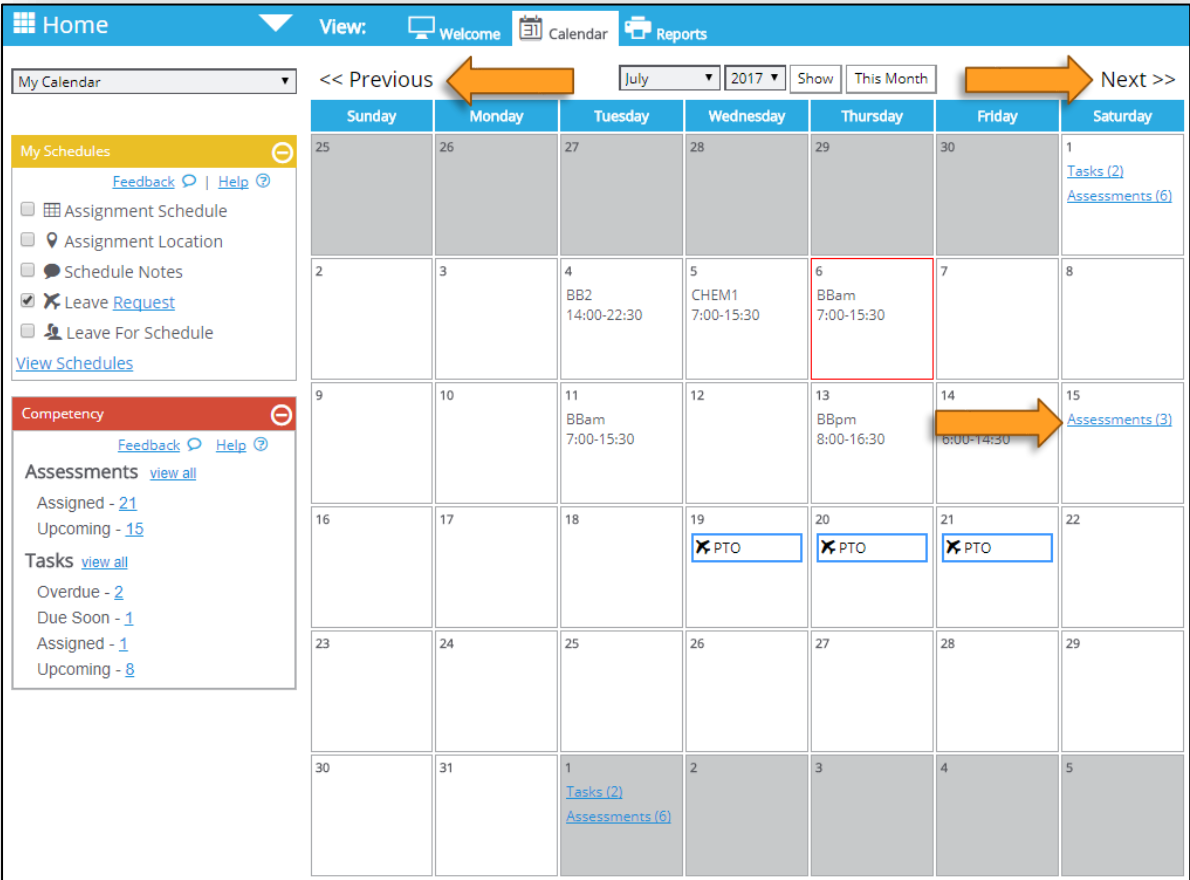
| Filter | Filter Subject | Filter Document          | Filter Requireme    | Filter Skillset | Show All | Filter Dates |            |                            |
|--------|----------------|--------------------------|---------------------|-----------------|----------|--------------|------------|----------------------------|
|        | Jim Halpert    | Problem Solving (Graded) | Problem Solving     | BioPlex         | Assigned | 07/01/2017   | 07/31/2017 | <a href="#">Start Task</a> |
|        | Jim Halpert    | Proficiency Testing      | Proficiency Testing | BioPlex         | Upcoming | 07/01/2017   | 07/31/2017 |                            |
|        | Jim Halpert    | Problem Solving (Graded) | Problem Solving     | Cobas           | Overdue  | 01/06/2017   | 02/05/2017 | <a href="#">Start Task</a> |
|        | Jim Halpert    | Proficiency Testing      | Proficiency Testing | Cobas           | Upcoming | 01/06/2017   | 02/05/2017 |                            |
|        | Jim Halpert    | Problem Solving (Graded) | Problem Solving     | HPV             | Upcoming | 08/01/2017   | 08/31/2017 |                            |
|        | Jim Halpert    | Proficiency Testing      | Proficiency Testing | HPV             | Upcoming | 08/01/2017   | 08/31/2017 |                            |
|        | Jim Halpert    | Problem Solving (Graded) | Problem Solving     | ImmunoCap       | Upcoming | 11/01/2017   | 12/01/2017 |                            |
|        | Jim Halpert    | Proficiency Testing      | Proficiency Testing | ImmunoCap       | Upcoming | 11/01/2017   | 12/01/2017 |                            |
|        | Jim Halpert    | Problem Solving (Graded) | Problem Solving     | Osmometer       | Due Soon | 06/15/2017   | 07/15/2017 | <a href="#">Start Task</a> |
|        | Jim Halpert    | Proficiency Testing      | Proficiency Testing | Osmometer       | Upcoming | 06/15/2017   | 07/15/2017 |                            |

### 3 | Viewing Assessments on the Calendar

If you have **assessments** and **tasks** that are assigned in the month that you are currently looking at in the **calendar**, you will be able to view those in the **calendar grid**.

#### Viewing Assessments on the Calendar

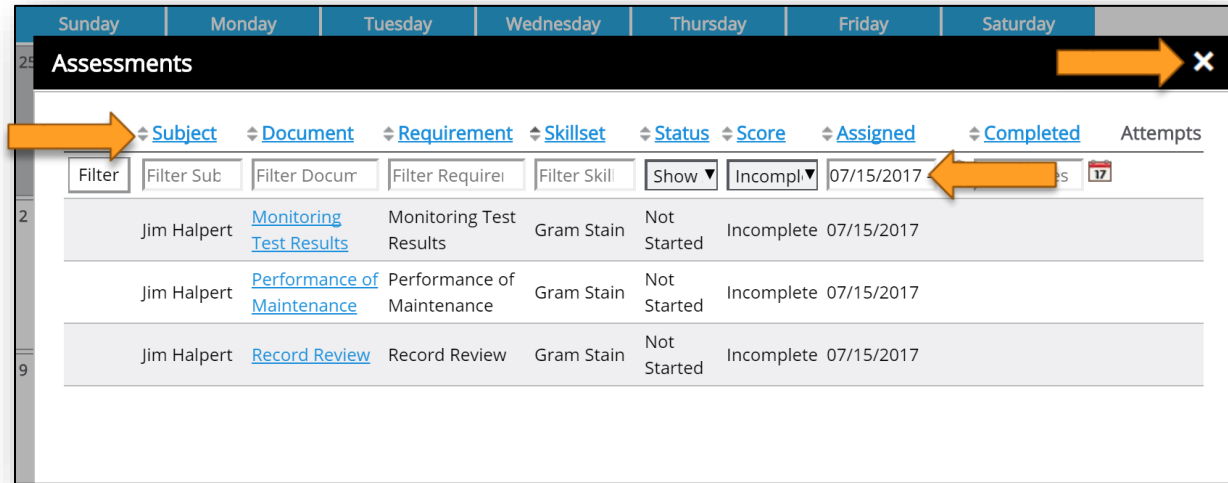
- 1. Navigate to the **Calendar** view.
- 2. Click **Previous** to view the previous month.
- 3. Click **Next** to view the next month.
- 4. Locate a day that has the [Assessments](#) or [Tasks](#) link and click on [Assessments](#) or [Tasks](#)



7. This will load a new window that will show you the **assessments** or **tasks** for that day

6. Use the **Sorting** and **Filtering** options at the top to get to the information you are looking for.

7. Once completed, click the 'X' to close the window



| Assessments |             |  |                            |              |             |            |            |           |          |
|-------------|-------------|--|----------------------------|--------------|-------------|------------|------------|-----------|----------|
|             | Subject     | Document                                   | Requirement                | Skillset     | Status      | Score      | Assigned   | Completed | Attempts |
| Filter      | Filter Sub  | Filter Docurr                              | Filter Requirei            | Filter Skill | Show        | Incompl    | 07/15/2017 |           | 17       |
| 2           | Jim Halpert | <a href="#">Monitoring Test Results</a>    | Monitoring Test Results    | Gram Stain   | Not Started | Incomplete | 07/15/2017 |           |          |
|             | Jim Halpert | <a href="#">Performance of Maintenance</a> | Performance of Maintenance | Gram Stain   | Not Started | Incomplete | 07/15/2017 |           |          |
| 9           | Jim Halpert | <a href="#">Record Review</a>              | Record Review              | Gram Stain   | Not Started | Incomplete | 07/15/2017 |           |          |

## 4 | Show Assessment Due Date and Qualified Personnel

Users can see when assessments are due and who is assigned the tasks for their assessments by clicking on the “document” for an assessment.

### Show Assessment Due Date and Qualified Personnel

1. Navigate to the **Calendar** view.
2. Click **Previous** to view the previous month.
3. Click **Next** to view the next month.
4. Click on any item that will show you **assessments** like the assessments on the grid, view all link in the Competency Menu, or the Assigned or Upcoming numbers.

The screenshot displays the StaffReady calendar interface. At the top, there is a navigation bar with 'Home', 'View: Welcome', 'Calendar', and 'Reports'. Below this, a dropdown menu shows 'My Calendar'. Navigation controls include '<< Previous' (with an orange arrow pointing left), a month/year selector 'July 2017', and 'Show This Month' and 'Next >>' (with an orange arrow pointing right). The main area is a calendar grid for July 2017, with days of the week as columns and dates as rows. The grid shows various tasks and assessments, with some cells highlighted in red. A sidebar on the left contains 'My Schedules' and 'Competency' sections. The 'Competency' section has a red header and lists 'Assessments' and 'Tasks' with 'view all' links and counts for 'Assigned' and 'Upcoming' items. Orange arrows point to the 'Previous' and 'Next' navigation buttons.

| Sunday | Monday | Tuesday                           | Wednesday                | Thursday                 | Friday           | Saturday                          |
|--------|--------|-----------------------------------|--------------------------|--------------------------|------------------|-----------------------------------|
| 25     | 26     | 27                                | 28                       | 29                       | 30               | 1<br>Tasks (2)<br>Assessments (6) |
| 2      | 3      | 4<br>BB2<br>14:00-22:30           | 5<br>CHEM1<br>7:00-15:30 | 6<br>BBam<br>7:00-15:30  | 7                | 8                                 |
| 9      | 10     | 11<br>BBam<br>7:00-15:30          | 12                       | 13<br>BBpm<br>8:00-16:30 | 14<br>6:00-14:30 | 15<br>Assessments (3)             |
| 16     | 17     | 18                                | 19<br>PTO                | 20<br>PTO                | 21<br>PTO        | 22                                |
| 23     | 24     | 25                                | 26                       | 27                       | 28               | 29                                |
| 30     | 31     | 1<br>Tasks (2)<br>Assessments (6) | 2                        | 3                        | 4                | 5                                 |

6. Click on the [Document Name](#) for the assessment that you want to view.

|    | Subject     | Document                                   | Requirement                | Skillset   | Status      | Score      | Assigned   | Completed | Attempts |
|----|-------------|--|----------------------------|------------|-------------|------------|------------|-----------|----------|
| 25 |             | <a href="#">Monitoring Test Results</a>    | Monitoring Test Results    | Gram Stain | Not Started | Incomplete | 07/15/2017 |           |          |
| 2  | Jim Halpert | <a href="#">Performance of Maintenance</a> | Performance of Maintenance | Gram Stain | Not Started | Incomplete | 07/15/2017 |           |          |
| 9  | Jim Halpert | <a href="#">Record Review</a>              | Record Review              | Gram Stain | Not Started | Incomplete | 07/15/2017 |           |          |

7. You can now view the **Assessment Due Date** as well as the **Qualified Personnel** assigned

| Filter | Filter Assignee | Show All |            |            |  |       |
|--------|-----------------|----------|------------|------------|--|-------|
|        | David Wallace   | Upcoming | 07/15/2017 | 08/14/2017 |  | Email |
|        | Michael Scott   | Upcoming | 07/15/2017 | 08/14/2017 |  | Email |